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ABSTRACT

Although there are drawbacks to the case study method, using films presents opportunities for instructors to teach to the "higher" levels presented in learning objective taxonomies. A number of classifications of learning outcomes or objectives are well served by a teaching style employing the case approach. There seem to be as many different types of case study methods as there are writers on the subject. Perhaps the most useful typology of case methods, in part because of its simplicity, is that developed by Gay Wakefield for the public relations field. Because of the clarity of character and issue development, the 1935 film version of "Mutiny on the Bounty" was chosen for use in a sophomore level course titled "Principles of Leadership." Using Wakefield's typology, the film is a case history which becomes a case analysis during class discussion. Almost all of the topics that would be covered in a course in leadership are present in the film. The film meets the requirements of a good case as set out by other typologies of case studies. The most often claimed benefit of the case study method is that it teaches the student to think as opposed to teaching the student to memorize. Drawbacks to the case study method include: the method requires a great deal of time; discussion may not go in a direction the instructor wants; and instructors have to be prepared to be challenged during discussion and may have to admit ignorance. (Thirty notes are included.) (RS)

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"MUTINY ON THE BOUNTY"
A CASE STUDY FOR LEADERSHIP COURSES

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"MUTINY ON THE BOUNTY"
A CASE STUDY FOR LEADERSHIP COURSES

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A useful definition of teaching is that it is "the intentional arrangement of situations in which appropriate learning will occur."[1] In order to make such an intentional arrangement, the objectives of the process must be set out--how will students be different after the lesson?--and then the appropriate teaching style can be selected. This paper presents a brief justification for the use of the case study method based upon several major learning outcomes taxonomies. It then applies that analysis to the use of the film "Mutiny on the Bounty" in a course, or course section, on leadership.

TAXONOMIES

There are a number of classifications of learning outcomes or objectives. For example, Robert Gagné set out an eight item taxonomy of learning types:

1. Signal learning - responding to signals.
2. Stimulus - Response Learning - psycho-motor.
3. Chaining - connecting previously learned stimulus - responses.
4. Verbal Association - verbal chaining.
5. Discrimination Learning - discrimination among similar items.
6. Concept Learning - verbal discrimination.
7. Role Learning (Principles) - verbal chains of concepts.
8. Problem Solving - Combine rules into novel higher-order rules.[2]

Perhaps the best known of these educational taxonomies are those developed by Benjamin Bloom and William Perry. Bloom's "Taxonomy of Educational Objectives" is as follows:

1.10 Knowledge of Specifics

1.11 Knowledge of Terminology

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[1]Robert J. Menges, "Instructional Methods," in The Modern American College, ed. Arthur W. Chickering (San Francisco: Jossey-Bass, 1981) 556.

[2]Robert M. Gagné, The Conditions of Learning, 2nd ed. (New York: Holt, Rinehart and Winston, 1970) 35-64.

1.12 Knowledge of Specific Facts

1.20 Knowledge of ways and means of Dealing with Specifics

1.21 Knowledge of Conventions

1.22 Knowledge of Trends and Sequences

1.23 Knowledge of Classifications and Categories

1.24 Knowledge of Criteria

1.25 Knowledge of Methodology

1.30 Knowledge of the Universals and Abstractions in a Field

1.31 Knowledge of Principles and Generalizations

1.32 Knowledge of Theories and Structures

2.00 Comprehension

2.10 Translation

2.20 Interpretation

2.30 Extrapolation

3.00 Application

4.00 Analysis

4.10 Analysis of Elements

4.20 Analysis of Relationships

4.30 Analysis of Organizational Principles

5.00 Synthesis

5.10 Production of Unique Communication

5.20 Production of a Plan or Set of Operations

5.30 Derivation of a Set of Abstract Relations

6.00 Evaluation

6.10 Judgements in Terms of Internal Evidence

6.20 Judgements in Terms of External Criteria[3]

Perry's nine item approach is more of a psychological journey that a typical college student goes through than a set of specific intellectual skills that are developed, but it is still useful for this analysis. Briefly, Perry holds that a typical college student starts at position 1 where he/she sees the world in a right/wrong dualism and that Authority knows the answers. The student progresses to a point of recognizing diversity and uncertainty but sees this as due to "unwarranted confusion in poorly qualified Authorities" (position 2). Next, the student accepts uncertainty as legitimate but temporary until Authority finds the answer (position 3). From there, the student

[3]Benjamin S. Bloom, ed., Taxonomy of Educational Objectives (New York: David McKay, 1956).

progresses through the belief that "everyone has a right to their own opinions" (position 4), to a relativism in which the position 1 dualism is seen as an exception (position 5). In position 6, the student sees a need to make a personal commitment in order to orient him or herself in the face of this relativism. The student then makes an initial commitment (position 7), experiences the implications of the commitment in terms of responsibility (position 8), and then realizes the commitment as an ongoing expression of a life style (position 9).[4]

The "higher" of the objectives described by Gagné (item 5 and up), all of Bloom's objectives, and at least positions 3 through 8 of Perry's analysis, are well served by a teaching style employing the case approach as will be demonstrated below.

THE CASE STUDY METHOD

Typologies. There is no such thing as a "case study" method. There seems to be as many different types of case study methods as there are writers on the subject. For example, Donald Simmons classifies cases into these types: Background Case; Exercise Case (practice certain techniques); Situation Case (describes issues or events--what is normally meant when using the term "case"); Complex Case (diagnose underlying issues); Decision Case (exercise judgement--develop action plan); In-Tray Case (documents--variation on Decision Case); Critical Incident Case (give some information, learners have to ask for other information); Sequential Case (stop action so learners can predict or suggest outcome); and Role Play Case.[5]

Another typology is offered by Colin Armistead: Exercise Case (practice application); Situation Case (analyze information); Complex Case (extension of situation--irrelevant information given); Decision Case (present plans for solving a problem); In-Basket Case (given documents--record action taken); Critical Incident Case; Action Maze case (present large case in steps--ask learners to predict); and Role Play Case.[6]

Perhaps the most useful typology, in part because of its simplicity, is the one presented by Gay Wakefield in reference to the use of cases in the Public Relations field:

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[4]William G. Perry, Jr., Forms of Intellectual and Ethical Development in the College Years (New York: Holt, Rinehart and Winston, 1968) 9-10.

[5]Donald D. Simmons, "The Case Method in Management Training," In Management Development and Training Handbook, eds. Bernard Taylor and Gordon L. Lippitt (New York: McGraw Hill, 1975) 185-188.

[6]Colin Armistead; "How Useful are Case Studies?" Training and Development Journal 38 (February 1984) 75-77, at 75.

The Public Relations Case--"a set of circumstances, real or hypothetical, exemplifying the occurrence of one or more public relations theory or method."

The Public Relations Case History--"a record of the specific components of a public relations case which actually has been conducted."

The Public Relations Case Analysis--"an examination of a public relations case history, and evaluation of the case's components as they relate to public relations theories and models."

The Public Relations Case Problem--"a question related to a public relations case and requiring inquiry, consideration, and/or solution based on public relations theories and models."[7]

It is this typology by Wakefield that will be referred to in the rest of the paper.

Requirements of the Case Study Method. Bradford Boyd writes that a good case starts by defining the principles one wants to illustrate. Then a situation is needed that will allow illustration of these principles. This entails developing the symptoms that allow for discussion of the principles and developing the characters within the situation.[8] Similarly, Pigors and Pigors write that a good case should be based in the real world, give the facts necessary to illustrate the principles, be objective, be multi-dimensional, indicate the interpersonal relationships involved, and portray the process of change from the start of the case until its end.[9]

Benefits of the Case Study Method. There are a number of benefits claimed for the use of the case study method. Specific lists will vary from author to author. As did the case approach to the study of law, the case approach in the study of business started at Harvard. In the book published to explain the case approach at Harvard, the three main advantages claimed over and over again for the case study method were 1)

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[7]Gay Wakefield, "The Case as a Public Relations Learning Tool," paper presented at the Annual Convention of the Association for Education in Journalism and Mass Communication, Boston, MA, August, 1991, 2.

[8]Bradford R. Boyd, "Developing Case Studies," Training and Development Journal 34 (June 1980) 113-117, at 115.

[9]Paul Pigors and Faith Pigors, "Case Method," in Training and Development Handbook, 3rd ed., ed. Robert L. Craig (New York: McGraw-Hill, 1987) 423.

teaching thinking,[10] 2) teaching that there were no "right" answers,[11] and 3) teaching problem solving.[12] A similar list was provided by Ellen Malasky: improvement in critical thinking, problem solving, and decision making; providing the students with a realistic and practical experience; and using cases to evaluate analytical skills and the ability to separate fact from inference.[13] In addition to the benefits claimed by the Harvard Business School and by Malasky, Donald Simmons adds improvement in interpersonal skills, increased sensitivity to issues, improvement in creative thinking, increased awareness of the need for further inquiry, and increased communication skills.[14]

APPLICATION

"Mutiny on the Bounty." There have been several movies based upon the 1788 mutiny aboard the English ship the "Bounty." The first was a basic documentary type of film made in 1932 titled "In the Wake of the Bounty" and starring an unknown, at that time, actor named Errol Flynn as Fletcher Christian. The film that is the discussion of this paper was made in 1935 by MGM and starred Charles Laughton as Captain Bligh and Clark Gable as Fletcher Christian. The director was Frank Lloyd. A remake in 1962 had Marlon Brando cast as Fletcher Christian and Mel Gibson played that role in the 1984 film retitled "The Bounty." The 1935 film won the Academy Award for best picture, and it is the only film that has had three actors nominated for the best actor award (Franchot Tone was the third nominee).[15] The film was based on the book Mutiny on the Bounty, by Charles Nordhoff and James Normal Hall,[16] one book of a

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[10]Arthur Stone Dewing, "An Introduction to the Use of Cases," in The Case Method at the Harvard Business School, ed. Malcolm P. McNair (New York: McGraw Hill, 1954) 2.

[11]Charles I. Gragg, "Because Wisdom Can't be Told," ibid., at 9.

[12]Malcolm P. McNair, "Tough-Mindedness and the Case Method," ibid., at 22.

[13]Ellen Weisberg Malasky, "Instructional Strategies: Non Media," in The Handbook of Human Resource Development, ed. Leonard Nadler (New York: John Wiley, 1984) 9.5-9.7.

[14]Simmons, supra note 5, at 188-190.

[15]James Monaco, The Movie Guide (New York: Putnam, 1992) 595-597.

[16]Charles Nordhoff and James Norman Hall, Mutiny on the Bounty (Boston: Little, Brown and Company, 1932). This book is written from a position very sympathetic to Christian and the mutineers. Captain William Bligh's account of the voyage is also available--The Mutiny on Board H.M.S. Bounty (New York: Airmount Books, 1965). A recent book on the subject by Sam McKinney provides a more balanced account of the events than Nordhoff and Hall were able to provide because of McKinney's

trilogy based on the events of the mutiny. Playing time is 133 minutes. The 1935 version of the film was selected to be used in the class, in spite of its being in black and white and not being as technically sophisticated as the later remakes, because of the acting ability of the lead actors and, more importantly, because of the clarity of character and issue development.

Briefly, the story line of the film is as follows: Captain Bligh is given command of the Bounty which has been commissioned to make a voyage to Tahiti. The main purpose of the trip is to bring back breadfruit plants to be used for feeding slaves. Fletcher Christian, raised as a "gentleman" unlike Bligh, is the second in command. Some of the seamen are "pressed" into service. After various hardships during the voyage, Tahiti is reached and the breadfruit plants obtained during a six month stay on the island. Shortly after leaving Tahiti for the return trip to England, Christian leads a mutiny. Bligh and most of his loyal followers are cast adrift in a life boat. Christian and the rest of the men return to Tahiti in the Bounty. Bligh and his crew make a 3500 mile open sea voyage in the lifeboat--one of the great navigational feats of all time. Bligh secures command of another ship to search for the mutineers. Bligh returns to Tahiti, but Christian escapes in the Bounty. A number of men remain on the island instead of going with Christian and are taken back to England by Bligh where they are tried for mutiny. Some are executed and some are pardoned. Christian and most of his followers end up on Pitcairn Island and the Bounty is burned in order to minimize the risk of being found by other searchers. Critical incidents in the film include several cases of harsh discipline (including flogging a seaman who had already died), short rations due to the "Captain's prerogative" which was a sort of accepted graft, a public chastisement of Christian by Bligh, the ease of life on Tahiti, Bligh's public accusation that Christian had stolen coconuts, and the spark of the mutiny was the cutting of water rations for the men so that the breadfruit plants could be adequately cared for.

The Course. The course in which the film is used as an extended case study is a sophomore level course titled "Principles of Leadership." The course attempts to strike a balance between theory and practice. The text is Warren Bennis and Burt Nanus--Leaders (New York: Harper and Row, 1985). The text is supplemented with a series of readings from diverse sources. A number of games, written case studies, and a major simulation exercise are used in addition to the film. The major topics covered in

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access to materials unavailable to Nordhoff and Hall. Bligh (Camden, Maine: International Marine Publishing Co., 1989).

the course are: Definitions and Context; Basic Organizational Theories; Leadership Styles/Traits; Power; Groups/Team Building; Decision Making; Communication/Motivation; and Delegation. These topic headings are similar to the chapter headings in the recently published leadership textbook by Hackman and Johnson[17] and the "Part" headings in the major reference book in the area.[18]

Typology. Using Wakefield's typology above, the film fits most obviously into a case history defined as "a record of the specific components of a . . . case which actually has been conducted." But during the discussion of the film it becomes a case analysis defined as an "examination of a . . . case history, and evaluation of the case's components as they relate to . . . theories and models."[19]

Almost all of the topics that would be covered in a course in leadership are present in this film. In terms of leadership styles, the contrast between Bligh and Christian is a textbook case of the authoritarian versus democratic leader, or a Theory X versus a Theory Y leadership approach. Bligh is very task oriented and the men are simply means for accomplishing that task. Christian is much more people oriented than Bligh and there are several sharp exchanges between the two during the film on how to treat people. The notion of situational leadership naturally arises when Bligh is cast adrift in the lifeboat then his single-mindedness of purpose seems perhaps more desirable than Christian's style of leadership.

The nature and use of power is a clear focus of the film. Bligh's use of coercion and legitimacy as power bases stand in sharp contrast to Christian's reliance upon reward and referent power. Until the lifeboat situation, Bligh is clearly a power wielder while Christian is a leader. The close of the film, which has a crawl stating that this mutiny and the resultant trial led to a reworking of the Law of the Sea and a different type of relationship between officers and men, reinforces the discussion on power. This aspect of the film also sets up a discussion as to how leaders can/should motivate their followers.

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[17]Michael Z. Hackman and Craig Johnson, Leadership: A Communication Perspective (Prospect Heights, Illinois: Waveland Press, 1991).

[18]Barnard M. Bass, Bass and Stogdill's Handbook of Leadership, 3rd ed. (New York: Free Press, 1990).

[19]Supra note 7.

A discussion on communication and decision making is also presented by the film. There are several exchanges between Bligh and Christian regarding listening to others and getting input before decisions are made. Bligh makes it clear that he has no desire for input from others and that he does not consider anyone else as worth taking the time to listen to. This influences how he makes decisions. On the other hand, Christian solicits and heeds the advice of others. It results in different decisions and a different relationship between leadership and followers.

The film can also be used in a way that it becomes what Wakefield calls a case problem--"a question. . . requiring inquiry, consideration, and/or solution based on. . . theories and models."[20] The way this can be done is to stop the film at given points and lead the relevant discussion: What has happened to this point? What are the causes of the actions? What are the probable outcomes? If these outcomes are not desirable, what, if anything, can be done at this point? If the outcomes cannot be changed, what can/should be done to minimize the damage? Etc. Thus "Mutiny" can be used as a case history, a case analysis, or a case problem depending upon the objectives and methods of the instructor.

Requirements of the Method. "Mutiny" meets the requirements of a good case as set out by Boyd and by Pigors and Pigors. Boyd wrote that the instructor starts with the principle(s) he or she wants to illustrate. That could be power, leadership styles, etc. Then a situation is needed to illustrate the principle(s). Leading people under stress situations, as in the film, is such a situation. Then Boyd writes that symptoms have to be developed within the situation (the critical incidents above) and that there also has to be character development. The film, unlike most paper case studies, allows for ample character development. This is important if the instructor develops, as here, the situational aspects of leadership.[21]

Pigors and Pigors add that a good case should be based in the real world. "Mutiny on the Bounty" was an important historical event that resulted in changes in the nature of leadership in the British navy. It is easy to make the importance of this case clear to students. The Pigors also write that any good case should be multi-dimensional. The "Mutiny" situation is certainly multi-dimensional. While Bligh does not come across as an appealing figure, there are always students willing to argue that,

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[20] Ibid.

[21] Supra, note 8.

in given situations, the leadership style he exhibited is to be preferred to that employed by Christian. Students are also ready to raise the issue as to whether or not disobedience to legitimate authority is ever justified (an issue raised at Nurenburg and in the anti-Vietnam war protests). Next, Pigors and Pigors indicate that a good case study should demonstrate the interpersonal relationships involved. A film does this in ways that could never be accomplished with a paper case study. Finally, the Pigors write that a case study should portray the process of change from the start of the case until the finish. "Mutiny" does this extremely well, taking the viewers from the optimistic start of the voyage, through despair and anger, to the crisis of the mutiny, and then to the denouement of the trial.[22]

Benefits of the Method. The most often claimed benefit of the case study method is that it teaches the student to think as opposed to teaching the student to memorize.[23] This fits into the learning objective taxonomies as set out in the first part of this paper. Clearly, the case method, if done right, teaches thinking as defined by Gagne's higher order item 5 (Discrimination among items), item 6 (Concept Learning), item 7 (Principles), and, depending on how the film is used, item 8 (Problem Solving).[24] The different theories of leadership are discriminated among and recognized in use, applications in the "Mutiny" situations are analyzed, how the principles interact and combine are presented and discussed, and, if the film is used as a problem-solving case (above), the student is asked to work through what will probably happen and what can/should be done at that point in the events.

Similarly, the case study method fits comfortably within Bloom's Taxonomy.[25] Specifics of various background theories, ways of dealing with them and the theories within the study of leadership, are explored in explaining what is happening within the "Mutiny" situation. The student's comprehension of the theories can be gained during the discussion. How the theories were applied and misapplied in this situation can be explored. Analysis is taught by breaking the fact situations down into various elements and then synthesis is taught if the film is used as a problem solving case by forcing the

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[22]Supra, note 9.

[23]Dewing, supra note 10 and Malasky, supra note 13.

[24]Supra, note 2.

[25]Supra note3.

student into having to use his or her knowledge to reconstruct the theories in a way that solves the problem presented. Hopefully, the instructor-led discussion after this process is concluded, teaches evaluation.

Use of the case method is also useful in addressing several of Perry's stages of intellectual and ethical growth.[26] A case study discussion, even one that is historically based, should emphasize that reality is multi-dimensional (and the situational approach to leadership styles does this very well) and that there are no definite right or wrong answers in such situations. Often, the choice of a leadership style depends upon a personal commitment to the values one holds as to how others (followers) should be treated. The discussion of these issues will lead the student away from Perry's initial right/wrong dualism.

Besides teaching the student to think, that there are no right answers, and problem solving skills,[27] it is claimed that the case method can provide the student with a realistic and practical experience.[28] Certainly the "Mutiny" film does this. It puts students into an historical event that had serious consequences for the people involved. The theories become much more definite and real under those circumstances. Interpersonal and communication skills are also taught by the case method.[29] Class discussion of the case which, depending upon the instructor, may occur after small group discussions, forces students to be able to publicly express and defend their analyses and to do so in a way which is not critical of others and destructive of the group environment.

There was one brief study of the benefits of using film cases versus using written cases. Sections of a class at the University of Georgia College of Business Administration were divided into two groups. Instruction in the different groups were identical expect that one group used cases presented in written form and the other group used cases presented in filmed form. Results were compared at the end of the semester. The researchers found that the students that used the filmed cases were evaluated as superior to the other group in terms of mastery of materials and in terms of the student's realistic concept of the manager's environment. Those same students

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[26]Supra, note 4.

[27]Gragg, supra 11 and McNair, supra note 12.

[28]Malasky, supra note 13.

[29]Simmons, supra note 5.

were also evaluated more highly than the written case group in the ability to transfer their learning in the discussed situations to new situations, but the difference in this area was not statistically significant as it was in the other two areas. Unfortunately, the researchers did not give an extensive explanation as to why these results were obtained.[30] In this instructor's experience, the difference is due to the fact that there is more character development in the film situation so it is more realistic, it is more vivid and memorable because of the mode of presentation, and the process is more apparent in a filmed presentation than in a written presentation.

CONCLUSION

While seldom discussed in the literature, there are several drawbacks to the use of the case method. One drawback is time. This is particularly true when using a feature length film as a case. It is much more efficient to simply lecture and present the material in that way. Another possible drawback is that the discussion may not always go the direction the instructor wants and, particularly, may not go that direction in a nice, orderly way. But if discussion is too tightly controlled, then many of the benefits of the case study method are lost. Finally, the instructor has to be prepared to be challenged during discussion and may have to admit to ignorance when the discussion takes an unexpected turn.

But if the instructor is interested in teaching to the "higher" levels presented on learning objective taxonomies, then the case study method presents opportunities that many other teaching strategies do not present. And in particular, filmed case studies may have advantages over the more traditional written approach.

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[30]Thad B. Green and Morton Cotlar, "Do Filmed Cases Improve the Case Method?" Training and Development Journal 28 (May 1973) 28-31, at 29-30.